

THE CONTRACTING PROCESS FOR A&E CONTRACTS VALUED UP TO \$25,000 IS AS FOLLOWS:

1. The Project Manager or Initiator (PM) requests the A&E Project Request Form from the Public Works Contracts (PWC) Consultant Services Coordinator (CSC). With the Project Request Form the CSC will email instructions regarding completion of the form. The PM will provide PWC with:
 - a. A completed A&E Project Request Form including a WBS or Internal Order number open to PWC,
 - b. The Scope of Services, and
 - c. Completed Human Resources (HR) Approval form with authorization signature from HR liaison.
 - d. Firm selected from SLBE/ELBE list or approved EOCP waiver.
2. Upon receipt of proper project intake documentation (see 1a.-1d. above), the CSC provides the Contract Number (H#####) and forwards the PM the appropriate Boiler Contract.
3. The PM adds their project specific information to the boiler and returns the Draft Contract to PWC for review. The Draft Contract will be submitted in **Microsoft Word** format and will include the completion of all data fields in the Boiler Contract as well as:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation and Fee Schedule and
 - c. Exhibit C – Time Schedule.

Incomplete Draft Contracts will be returned to the PM.

4. PWC will review the Draft Contract and return it to the PM along with additional instructions and forms that must be completed and returned. After PWC's review, the PM must have their assigned Deputy City Attorney review the Draft Contract as well; BEFORE it is sent to the consultant for signature. Once reviewed by both PWC and the Deputy City Attorney the Draft Contract becomes the Final Contract.
5. The PM will transmit a PDF of the Final Contract to the consultant for signature.

Note 1: PWC does not require an E-PA 2625 or E-1544, but, **for non CIP funded contracts**, if the selected consultant has been awarded more than \$250K in contracts or amendments in the current fiscal year (including the current award), City Council approval (via E-1472) will be required in order to award the contract. For **CIP funded contracts** the current fiscal year award threshold is \$1 million (including the current award) before an E-1472 is required for contract award. If your contract is partially or fully Operations & Maintenance (O&M) funded, please contact PWC for additional instructions.

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Note 2: If you discover that an E-1472 is required to award your contract please STOP using this procedure summary and contact PWC to request the procedure for awarding a contract via an E-1472. DO NOT continue following the remainder of the steps below.

6. When the PDF of the signed Contract is returned by the consultant, the following items are emailed to Cindy Crocker at ccrocker@sandiego.gov:
 - a. PDF copy of the Contract signed by the consultant that includes all applicable exhibits in the Contract filled out by consultant.
 - b. Completed Consultant Award Tracking Form (provided to you by PWC). The top portion is completed by you and the bottom portion is completed and signed by the consultant.
 - c. Confirmation who your assigned DCA is.
 - d. Confirmation the Consultants insurance is compliant with Ebix (PWC will provide you instructions on this process at the time of our draft review).
 - e. Disclosure Determination Form, CC-1671 (provided by PWC) signed by someone in your department at the Deputy Director level or above.
 - f. Consultant's signature authority document (PWC will provide you additional instructions on this item at the time of our draft review)
7. PWC reviews the contracts and the insurance. If contracts and insurance are acceptable, PWC assigns a SAP Outline Agreement (OA) number and provides this OA number to the PM.
8. PM enters purchase requisition into SAP. The PM should ensure their Purchase Requisition includes the name of the selected Consultant and the Contract Number for the project. The Contract Number should be typed into the "Texts" field.
9. Upon receipt of the purchase requisition, PWC assigns a Purchase Order (PO) number, signs the Contract, then emails the package to the City Attorney's Office for final signature.
10. The City Attorney's Office reviews the Contracts and insurance. If all is acceptable, the Attorney's Office signs the Contracts, and emails the package back to PWC.
11. PWC issues a Notice to Proceed (NTP) and distributes a PDF copy to the Consultant, PM & EOCP.